

**Comfort Partners / WAP Partnership Process**  
**12/5/2018**

**Definitions:**

**The following definitions shall apply wherever the defined words are used herein:**

- 1) "BPU" means the New Jersey Board of Public Utilities.
- 2) "DCA" means the New Jersey Department of Community Affairs.
- 3) "CP" or "CP Program" or "Comfort Partners" or "New Jersey Comfort Partners" means the New Jersey Board of Public Utilities New Jersey Comfort Partners Program.
- 4) "WAP" or "DCA WAP" or "Weatherization Assistance Program" means the New Jersey Department of Community Affairs Weatherization Assistance Program.
- 5) "CP Contractor" means the New Jersey Comfort Partners Program contractor hired to install energy saving measures.
- 6) "WAP Agency" means the Weatherization Assistance Program agency granted to install energy saving measures.
- 7) "CP Auditor" is the New Jersey Comfort Partners home energy auditor.
- 8) "WAP Auditor" is the Weatherization Assistance Program home energy auditor.
- 9) "Utility Manager" or "Utility Representative" means the New Jersey Comfort Partners Program utility representative responsible for managing program related contractors and work.
- 10) "WAP Monitor" means the New Jersey Department of Community Affairs representative responsible for managing Weatherization Assistance Program related agencies and work.
- 11) "Partnership" means the project that both New Jersey Comfort Partners Program and Weatherization Assistance Program are working on jointly.
- 12) "Partnership Lead" or "Lead Partner" means the contractor or agency that initiated the partnership project.
- 13) "Assistant Partner" means the contractor or agency agrees to join the partnership project that the Lead Partner as initiated.
- 14) "First Partner" means the party that will need to perform health & safety work first.

- 15) "Second Partner" means the party that will need to perform health & safety work after the First Partner has finished their health & safety work.
- 16) "Partnership Request Form" means the form that the Partnership Lead provides to the Assistant Partner formally requesting to partner on a customer job.
- 17) "Joint Audit" means the home energy audit that is conducted jointly by both programs at the same time.
- 18) "Joint Scope of Work" means the scope of work that is generated based upon the Joint Audit.
- 19) "Joint Scope of Work Form" means the form used to document the Joint Scope of Work.
- 20) "Complete with Barriers" means New Jersey Comfort Partners Program jobs where barriers prevented program staff from completing full weatherization scope.
- 21) "Deferral" means Weatherization Assistance Program jobs where barriers prevented program staff from completing full weatherization scope.
- 22) "NEAT Audit" means the Weatherization Assistance Program energy tool used to develop a scope of work.
- 23) "Final Joint Inspection" means the final inspection conducted by both programs to ensure all measures have been completed and installed correctly according to program scope and standards.
- 24) "Customer Satisfaction Survey" means the satisfaction survey provided to the customer upon completion of work.
- 25) "Job Completion Form" means the form which the customer signs to indicate that all work was completed to their satisfaction.
- 26) "Job Closure Form" means the form the Lead Partner must complete and provide to the PSE&G Partnership Lead at job closure for data tracking purposes.
- 27) "Cost Sharing" means the usage of one program's funding or resources by the other program. For example: A DCA funded truck could not transport Comfort Partners materials.
- 28) "PSE&G Partnership Lead" means the PSE&G representative responsible for tracking all data reflected on the Job Closure Form. Currently, this representative is Marlon Avelino.

## Comfort Partners / WAP Partnership Process

### Identify Potential Partnership Customer

#### 1. CP or WAP Job Considered Outside of Program Scope

- a. CP or WAP job considered outside of program scope will be the initial indicator to both parties that the job could be a potential partnership.
  - i. Eligibility criteria for partnership:
    1. Customer is a homeowner.
    2. Natural gas or electric utility heat customer.
    3. Single family or maximum four (4) unit multi-family home.
  - ii. Desirable criteria for partnership:
    1. Large weatherization scope of work.
    2. Customer income eligible for both programs.

#### 2. Appropriate Customer for Partnership?

- a. Yes.
  - i. Party that initiated the partnership will contact the Assistant Partner to inform them of the potential project and request a joint audit be performed. Request will be made via the Partnership Request Form.
  - ii. Assistant Partner will review proposed work and accept or deny joint audit.
  - iii. Party that initiated the partnership project will be considered the lead on the project until all work is completed.
- b. No.
  - i. If WAP initiated job then customer will be informed of deferral. If Comfort Partners initiated job then customer will be informed of 'Complete with Barriers' job status.

#### 3. Partner & Customer Accept Joint Audit?

- a. Yes.
  - i. Partnership Lead will contact customer to explain the partnership process & schedule a joint audit.
- b. No.
  - i. If WAP initiated job then customer will be informed of deferral. If Comfort Partners initiated job then customer will be informed of 'Complete with Barriers' job status.

### Determine Feasibility of Partnership

#### 4. Perform Joint Audit

- a. The following representatives attendance is necessary at the start of any joint audit:
  - i. CP Auditor
  - ii. WAP Auditor
  - iii. WAP Monitor

- iv. CP Utility Representative
- b. Lead partner and their respective auditor will take the lead on describing the barriers in home and lead all parties in a walkthrough of the home.
  - i. Important that all parties remain together during walkthrough process to ensure all involved are on the same page and that nothing is missed.
  - ii. Important that photos are taken by both program representatives.

#### **5. Partnership Job?**

- a. **Yes.**
  - i. The partnership team should conduct a robust discussion of the work involved to complete the project.
  - ii. Ensure all parties involved understand the barriers and weatherization work involved and all are comfortable with size and scope of project.
  - iii. Attempt to informally agree to separation of duties (which will guide the creation of a joint scope of work) while on-site upon completion of joint audit.
- b. **No.**
  - i. If WAP initiated job then customer will be informed of deferral. If Comfort Partners initiated job then customer will be informed of 'Complete with Barriers' job status.

#### **6. Separation of Duties Informally Agreed Upon?**

- a. **Yes.**
  - i. Informal separation of duties will be agreed upon on-site.
    - 1. No cost sharing between the two programs.
- b. **No.**
  - i. This is an indication that additional discussion, input or research may be needed prior to parties creating a joint scope of work.
    - 1. Example 1: WAP still needs to conduct NEAT audit prior to creating a joint scope of work.
    - 2. Example 2: If determining whether project will be a partnership or not is dependent on one or more critical sub-contractor proposals.

#### **Generate Scope of Work**

#### **7. Partnership Lead Generates Draft Joint Scope of Work**

- a. Partnership Lead will populate the Joint Scope of Work Form according to what was informally agreed upon during the in-person joint audit. This is a high level scope of work. Both parties are still required to complete the more detailed scope of work that each program requires. No cost sharing between the two programs.
- b. Partnership Lead will send the complete Joint Scope of Work form to Assistant Partner for review/approval.
- c. Maximum spending allowance for partnership (utility and/or monitor approval needed to exceed):
  - i. \$30,000 maximum total job cost with heating/cooling equipment replacement.

- ii. \$25,000 maximum total job cost without heating/cooling equipment replacement.

**8. Partnership Lead Requests Partner Sign Joint Scope of Work Form**

- a. Assistant partner will review Joint Scope of Work form to ensure it has been completed according to what was informally agreed upon during the in-person joint audit.

**9. Partner Sign Joint Scope of Work Form?**

**a. Yes.**

- i. If the Joint Scope of Work is acceptable to the Assistant Partner, the form will be signed and sent back to the Lead Partner.

**b. No.**

- i. Lead Partner will incorporate any requested edits by the Assistant Partner and the form will be signed and sent back to the Assistant Partner for signature. No cost sharing between the two programs.

**10. Generate Schedule of Work to be Performed**

- a. Both partners will agree to the order of which the health & safety and weatherization work will be performed. If possible, partners will generate entire work schedule inclusive of dates at this step.
- b. Both parties will agree to which partner will need to perform health & safety work first based on what work is being performed.
  - i. Example 1: If the customer's home has asbestos on the distribution pipes which are also, themselves, in need of repair then the First Partner removes asbestos from the leaky distribution pipes so that Second Partner can repair the leaky distribution pipes.

**11. Schedule Customer for First Partner's Health & Safety Work**

- a. First Partner is the party that will need to perform health & safety work first.
  - i. First Partner will contact the customer and schedule first round of health & safety installation visits.

**Perform Health & Safety Work**

**12. Perform First Partner's Health & Safety Work**

- a. First Partner will complete all health & safety work they were delegated via the joint scope of work form.
- b. First Partner should have a supervisor at the contractor/agency confirm that all work has been completed according to the specifications detailed in the joint scope of work.
- c. First Partner will contact Second Partner to inform them of the completion of the first round of health & safety installation visits.

**13. Second Partner Reviews First Partner's Health & Safety Work Upon Completion**

**a. Work Complete?**

**i. Yes.**

- 1. Second Partner will contact the customer and schedule second round of health & safety installation visits; unless entire work schedule has already

been generated, in which case the customer would be called to confirmed the already agreed upon date.

ii. **No.**

1. Second Partner will contact First Partner and explain in detail the issues they found with the health& safety work that was completed by the First Partner.
2. Both parties will come to agreement as to what additional work is needed in order to move forward.
  - a. If issue unresolved, problem should be escalated to WAP Monitor or CP Utility Representative for further discussion and decision.

**14. Perform Second Partner's Health & Safety Work**

- a. Second Partner will complete all health & safety work they were delegated via the joint scope of work form.
- b. Second Partner should have a supervisor at the contractor/agency confirm that all work has been completed according to the specifications detailed in the joint scope of work.
- c. Second Partner will contact First Partner to inform them of the completion of the second round of health & safety installation visits.

**15. Perform Joint Review to Confirm Health & Safety Work Completed.**

- a. All parties involved will select a mutually agreed upon date to conduct a review of the health & safety work installed. This is to ensure that both parties feel the home is now safe for full weatherization scope according to program procedures/regulations.
  - i. **Health & Safety Complete?**
    1. **Yes.**
      - a. First Partner will contact the customer and schedule first round of weatherization installation visits.
    2. **No.**
      - a. Both parties will come to agreement as to what additional work is needed in order to move forward.

**Perform Weatherization Work**

**16. Perform First Partner's Weatherization Work**

- a. First Partner will complete all weatherization work they were delegated via the joint scope of work form.
- b. First Partner should have a supervisor at the contractor/agency confirm that all work has been completed according to the specifications detailed in the joint scope of work.
- c. First Partner will contact Second Partner to inform them of the completion of the first round of weatherization installation visits.

**17. Schedule Customer for Second Partner's Weatherization Work**

- a. Second Partner will contact the customer and schedule the final round of weatherization visits.

**18. Perform Second Partner's Weatherization Work**

- a. Second Partner will complete all weatherization work they were delegated via the joint scope of work form.
- b. Second Partner should have a supervisor at the contractor/agency confirm that all work has been completed according to the specifications detailed in the joint scope of work.
- c. Second Partner will contact First Partner to inform them of the completion of the second round of weatherization installation visits.

## **Finalize Job**

### **19. Schedule Customer for Final Joint Inspection**

- a. Lead Partner will schedule customer for a Final Joint Inspection visit.
- b. All parties involved will perform Final Joint Inspection.
  - i. **Work Complete?**
    - 1. **Yes.**
      - a. Partnership Complete.
        - i. Provide customer with Customer Satisfaction Survey.
        - ii. Customer must sign Job Completion Form.
    - 2. **No.**
      - a. Both parties will come to agreement as to what additional work is needed in order to complete project.
      - b. Whoever is responsible for completing the additional work will schedule with the customer and complete that work. A final inspection will be conducted again to ensure all parties are comfortable that the work is complete.
  - c. In the event an issue arises from the work that was performed after the final inspection was conducted, the following two steps shall be taken:
    - i. Both parties will come to agreement as to what additional work is needed in order to complete the project.
    - ii. Whoever is responsible for completing the additional work will schedule with the customer and complete that work. A final inspection will be conducted again to ensure all parties are comfortable that the work is complete.

### **20. Reporting / Job Closure**

- a. Lead Partner will complete the Job Closure Form and e-mail the form to the PSE&G Partnership Lead.
  - i. PSE&G Partnership Lead will incorporate data into master tracking database.
- b. Each Partner will follow their respective Program's job reporting / invoicing process.

### Key Ingredients for Successful Partnership:

- Appropriate Home Selection Important.
  - Large weatherization scope of work preferred.
  - Homeowner.
  - Natural gas or electric utility heat customer.
  - Single family or maximum four (4) unit multi-family home.
- Joint Audit / Joint SOW Critical.
  - Utility / DCA representative input helpful.
  - Tour the premises together as a group.
  - Work scope should be equitable.
  - Open communication.
  - Be mindful of each programs' standards.
  - Scheduling of work.
- Internal QA/QC throughout process.
  - Joint review should be conducted upon completion of health & safety work to ensure weatherization does not begin in a home that is still unsafe.
  - Final review at completion of all work will ensure customer satisfaction and joint scope of work was completed as agreed upon.
  - Each partner should be reviewing their work along the way to avoid issues that could arise between the partners if work installed incorrectly, not according to scope, carelessly, etc.
- Strive to decrease overall cost of job.
  - \$30,000 maximum total job cost with heating/cooling equipment replacement.
  - \$25,000 maximum total job cost without heating/cooling equipment replacement.
  - Work scope should be equitable and consider cost borne by both programs.
  - Both partners should consider cost and capabilities when dividing scope of work for increase efficiency purposes.
    - Example: If one partner has no experience with a particular measure installation process and the other does; they should break the scope of work out accordingly to maximize efficiency.
- Ensure customer is comfortable with lengthy process.
  - The fact that there are numerous site visits should be clearly explained to all participating customers.
- Full commitment from all parties involved absolutely necessary to successful partnership.
  - Our customers deserve nothing less than a full commitment from all involved.